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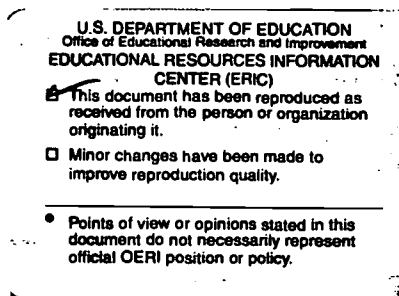
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## ABSTRACT

As part of the evaluation of schools participating in the Comprehensive School Reform Demonstration (CSRD) program, a site researcher is to visit each participating site twice a year to collect data for CSRD formative evaluation. To prepare site researchers for their evaluation activities, a training and orientation session was held for 18 prospective site researchers. This document reports on the evaluation of the site researcher training. A feedback form was used to assess the degree to which certain goals and objectives were met, and a modified participant observation technique was used to give presenters immediate feedback. Program materials were also reviewed. Participants found the training sessions to have been conducted in a professional manner by competent professionals, and they considered the sessions relevant to their needs. Participants seemed to have learned most about the role of formative evaluation in the CSRD program, comprehensive school reform, and specific data collection techniques. They felt the need for further information about comprehensive school reform models, identification of and collaboration with a local coordinator, and collaboration with assigned external facilitators. Recommendations are made to improve program presentation. Appendixes contain the training feedback form and a checklist for applying the standards from the "Program Evaluation Standards" (1994). (SLD)

## Site Researcher Training and Orientation

Louisville, Kentucky  
September 13-15, 1999



### A Report on the Formative Evaluation Process for School Improvement: A joint initiative between AEL, Inc. and the Center for Research in Educational Policy (CREP) at The University of Memphis

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at The University of Memphis

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AEL's mission is to link the knowledge from research with the wisdom from practice to improve teaching and learning. AEL serves as the Regional Educational Laboratory for Kentucky, Tennessee, Virginia, and West Virginia. For these same four states, it operates both a Regional Technology in Education Consortium and the Eisenhower Regional Consortium for Mathematics and Science Education. In addition, it serves as the Region IV Comprehensive Center and operates the ERIC Clearinghouse on Rural Education and Small Schools.

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## INTRODUCTION

### **Comprehensive School Reform Demonstration**

The Comprehensive School Reform Demonstration (CSRD) program, new in 1998, provides \$150 million for local schools to implement comprehensive school reform programs. Much of these CSRD funds flowed through a competitive grant process to schools and districts interested in implementing schoolwide, comprehensive reform. Of these monies, \$120 million came from Elementary and Secondary Education Act (ESEA) Title I funds, allocated by formula to states to allow current Title I schools to adopt comprehensive school reform models. The Fund for the Improvement of Education (FIE) allocated \$25 million to flow to states by school-age population to allow non-Title I schools to implement reform programs as well. In addition, \$4 million was allocated to Regional Educational Laboratories to assist states, districts, and schools in the implementation of the CSRD program. The remaining \$1 million was used by the U.S. Department of Education to inform states and local schools about existing comprehensive reform models.

As part of the application process to receive funds, schools were required to plan for the evaluation of CSRD implementation. To assist in meeting this evaluation need in local schools, part of AEL's CSRD work is to develop and deliver CSRD formative evaluation design materials and processes. To this end, AEL has undertaken a joint venture with the Center for Research in Educational Policy (CREP) at The University of Memphis to implement the Formative Evaluation Process for School Improvement (FEPSI).

## Formative Evaluation Process for School Improvement

The Formative Evaluation Process for School Improvement (FEPSI) is a package of services designed to facilitate schools' formative evaluation of their comprehensive school reform initiatives. It is provided to CSRD schools through the joint AEL/CREP initiative at a reasonable cost. To carry out FEPSI and complete the appropriate instrumentation, a trained individual called a *site researcher* is assigned to each participating site. The site researcher has primary responsibility for school-level data collection for CSRD formative evaluation. She or he conducts two critical site visits per year in each assigned school, one in the fall and one in the spring. The fall and spring visits each consist of a different slate of data collection activities.

During the fall visit, the site researcher conducts (1) a principal interview, (2) a *School Observation Measure*<sup>™</sup> (SOM) comprised of several classroom visits, and (3) a benchmark-writing session with a committee of faculty. The principal interview is a 1-hour forum for learning a principal's perceptions of CSRD implementation in his or her school. The SOM, an instrument developed by CREP, is a summary of ten 15-minute classroom observations typically conducted in the course of a few hours. In brief, the items on which classrooms are observed are best practices in instruction and instructional orientation that characterize the intended nature and organization of CSRD schools. Also adapted and designed by CREP, benchmarking is a process by which schools chart the course of CSRD implementation relative to the nine criteria; the resultant benchmark document is intended to be a signatory piece that a school owns and refers to over the course of three years of implementation and thereafter.

In the intervening period between the two visits, schools receive technical assistance and suggestions for revision on the first draft of their benchmark document by phone and mail from

an AEL/CREP staff member. Also during this period, eight additional SOMs are conducted by a school's external facilitator, which are added to the data collected by the site researcher.

During the spring visit, the site researcher conducts (1) another SOM, (2) a focus group with a random selection of teachers, (3) a benchmark review with the committee that wrote the benchmark document in the fall, (4) a whole-faculty meeting, and (5) an interview design process.<sup>1</sup> Similar to the principal interview, the focus group is a forum for learning teachers' views of CSRD implementation. The benchmark review involves marking the school's progress along a continuum expressed within the benchmark document. The purpose of the faculty meeting is to administer two questionnaires, the *School Climate Inventory*<sup>™</sup> (SCI) and the *Comprehensive School Reform Teacher Questionnaire*<sup>™</sup> (CSRTQ), both developed by the Center for Research in Educational Policy at The University of Memphis (AEL & CREP, 1999). The SCI assesses school climate along seven dimensions, consisting of 49 statements set to a 5-point Likert-type scale. The CSRTQ assesses a school's movement toward school reform along four dimensions—professional development, resources, pedagogical change, and outcomes—and also its progress toward specific school benchmark goals.

A procedure called *interview design* was incorporated into the FEPSI package as a way of gathering data from individuals from role groups other than the faculty. Interview design is a musical chairs way of collecting data from many individuals in a small amount of time. All participants engage in asking and answering questions and analyzing responses. Those to be included in the Interview Design process are community members, parents, and students.

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<sup>1</sup>Interview design is a technique used at the Wharton School, Management and Behavioral Science Center, introduced to AEL by Oralie McAfee (AEL & CREP, 1999a).



If it is possible to coordinate, it is desirable that a school's external facilitator accompany the site researcher on both the fall and spring visits to a school. (External facilitators are individuals who have been assisting schools with the implementation of their CSRD efforts.) Following each visit, the site researcher is responsible for shipping data in appropriate formats to CREP. Based on the data collected by the site researcher and the external facilitator, staff of the AEL/CREP partnership prepare and mail a report to each participating school at the end of the year. Schools are assured of confidentiality and encouraged to use the report, along with their benchmarks, to adjust their activities to enhance CSRD implementation.

### **Site Researcher Training and Orientation**

Site researchers each agreed to serve one to several schools (out of 101) in AEL's four-state region (Kentucky, Tennessee, West Virginia, and Virginia) on a contractual basis. To prepare site researchers for their role in conducting FEPSI activities in these schools, a Site Researcher Training and Orientation for 18 prospective site researchers was held in Louisville, Kentucky, on September 13-15, 1999. A supplementary handbook compiled in a three-ring binder was given to each participant at the commencement of the training. It included overviews of CSRD and FEPSI, the scope of work for site researchers, sections explaining the various FEPSI activities, and some of the protocols to be used. An additional resource was provided during the instruction on SOMs, i.e., a booklet of definitions for the practices to be observed during a SOM (CREP, 1999).

### **Purpose and Objectives of Evaluation**

In an ongoing effort to improve its services and to satisfy its obligations to the U.S. Department of Education's Office of Educational Research and Improvement, AEL evaluates all

of its regional educational laboratory work. Accordingly, evaluation of AEL's CSRD work is undertaken to assess these services and their potential outcomes and impact. Questions related to basic reactions to and learning from the training were collected during the September 1999 event. Questions related to the impact of the training on participants' behavior and results of their learning will be assessed in subsequent evaluation activities. The specific objectives of the evaluation of this particular event were to

1. assess the extent to which the Site Researcher Orientation and Training met its stated goals and objectives
2. determine participants' knowledge gain and further need for skills required by the role of site researcher

### **Audiences for This Report**

The primary audiences for this report are the CSRD staff at AEL and the staff of the AEL/CREP partnership. Secondary audiences include other AEL staff and management, and researchers and evaluators interested in comprehensive school reform.

## EVALUATION METHODS

### Overall Evaluation Design and Components

Three techniques were used to evaluate the Site Researcher Orientation and Training session. First, a feedback form was used to assess the degree to which certain goals and objectives were met and to assess participants' learning and further needs. Second, a modified participant observation technique was used to give presenters immediate feedback. Third, informal, unstructured interviews were conducted with AEL/CREP staff to collect impressions regarding the implementation of the FEPSI process. In addition, the AEL evaluator reviewed the training materials provided to participants and used in the training. A set of research-based guidelines serve to undergird the evaluation of training in the CSRD efforts.

**Theoretical Guidelines.** In general, there are three major reasons to evaluate training: (1) to assure that it is meeting the outlined goals and objectives, (2) to decide whether to continue or discontinue training, and (3) to gain information on how to improve future training (Kirkpatrick, 1994). The two reasons for evaluating this training were (1) to assure that it is meeting the outlined goals and objectives and (2) to gain information on how to improve future training.

**Kirkpatrick model.** The Kirkpatrick model (Kirkpatrick, 1994) for evaluating training programs is used as an overarching schema to assess the effectiveness of CSRD training efforts. This model proposes evaluating training on four levels.

- *Reaction*—defined as the assessment of how participants react to the training
- *Learning*—defined as the extent to which participants change attitudes, improve knowledge, and/or increase skills as a result of attending the program

- *Behavior*—defined as the extent to which change in behavior occurs because a participant has attended the training program (For change to occur, four elements need to be present: (1) a person must have a desire to change, (2) a person must know what to do and how to do it, (3) a person must work in the right climate, and (4) a person must be rewarded for change.)
- *Results*—defined as the final results that occur because the participants attended the program

### **Data Collection Methods/Instruments**

The data collection methods used to evaluate the Site Researcher Orientation and Training were (1) a workshop feedback form, (2) a modified participant observation strategy by an AEL evaluator, and (3) informal, unstructured interviews with AEL/CREP staff.

**Feedback form.** A feedback form (see Appendix A) was developed by CSRD evaluators and staff to collect participants' reactions to the Site Researcher Orientation and Training. The items for the feedback form were created from information collected by AEL evaluators prior to the event. This information included (1) evaluation forms used at prior training of a like nature, (2) a draft agenda developed by AEL/CREP staff and presenters, and (3) written materials describing CSRD site researcher roles and responsibilities, and required knowledge, skills, and experience. The feedback form was divided into two sections. The first section assessed the extent to which the training met various general and specific objectives of training usually measured by AEL. Participants were asked to rate the extent to which the sessions met certain objectives on a scale of 1 (not at all) to 5 (very much). The first section assessed level 1, reaction, of the Kirkpatrick model. The second section measured the knowledge gained by the participants with respect to site researcher responsibilities and essential knowledge and skills, as well as the participants' further need for information regarding the roles, responsibilities, and

essential knowledge and skills. Participants were asked to rate each item on a scale of 1 (none or not at all) to 5 (very much or a lot). This section measured level 2, learning, of the Kirkpatrick model.

The instrument was administered to the participants by the AEL evaluator on-site near the completion of the training. Only those participants who were to serve in the role of site researcher completed the feedback form. Level 3 (behavior) and level 4 (results) of the Kirkpatrick model will be assessed at later points during the site researchers' experience in the schools.

**Modified participant observation.** The purpose of the modified participant observation was to observe the training activities in the role of a process evaluator, to record the completion of those activities, and to provide daily feedback to the training leaders. The participant observer was an AEL evaluator who took notes, sat with and discussed the training with the various groups of participants throughout the training, and met informally with participants as they were available to provide feedback to the evaluator. Participants were made aware that the focus of the observation was on the training and not participants.

**Informal, unstructured interviews.** The AEL evaluator met briefly with four AEL/CREP staff to gather impressions regarding the current training in particular and the implementation of the FEPSI process in general. The participants were informed that their responses would be anonymous and that the information would be used only to form general impressions about the implementation process to date.

## **Data Analysis Procedures**

Data analyses for this evaluation were completed by AEL evaluators at the AEL facilities in Charleston, West Virginia. The quantitative analyses were conducted using SPSS for Windows 9.0. Simple descriptive statistics were calculated for each item for the various participants.

## EVALUATION FINDINGS

This section presents the findings from the data collection methods used in this evaluation.

### **Workshop Evaluation Forms**

Eighteen participants completed the feedback form for the Site Researcher Training and Orientation sessions. The form was distributed by the AEL evaluator on-site near the end of the last day of the training. The AEL evaluator collected the forms as the participants completed them.

Table 1 displays the descriptive statistics for items in Section A of the feedback form.

**Table 1**  
**Descriptive Statistics for**  
**Section A of Training Feedback Form\***

Item	N	Mean	SD
1. Had clear outcomes	18	4.4	.62
2. Included clear directions for activities	18	4.4	.70
3. Facilitated development of new skills	18	4.6	.61
4. Was conducted in an appealing manner	18	4.6	.78
5. Was conducted in a professional manner	18	4.8	.38
6. Was conducted by competent presenter(s)	18	4.8	.38
7. Had activities that were well sequenced	18	4.4	.51
8. Had activities that reinforced content	18	4.4	.70
9. Included appropriate examples	18	4.6	.51
10. Was relevant to my needs	18	4.8	.43
11. Had meaningful involvement of participants	18	4.4	.78
12. Caused me to reflect on my practices	18	4.4	.62
13. Caused me to examine some of my attitudes	18	3.7	1.24
14. Stimulated me to want to use the concepts, skills, and/or materials presented	18	4.4	.86
15. Provided materials that will be useful to me in my future work as a CSRD site researcher	18	4.8	.51
16. Increased communication and collegiality with others	18	4.4	.70
17. Increased my understanding of formative evaluation	18	4.3	1.02

\*Scale of 1 (not at all) to 5 (very much)



Those items rated the highest included the following: *was conducted in a professional manner* (mean of 4.8, SD of .38); *was conducted by competent presenter(s)* (mean of 4.8, SD of .38); *was relevant to my needs* (mean of 4.8, SD of .43); and *provided materials that will be useful to me in my future work as a CSRD site researcher* (mean of 4.8, SD of .51). Nearly all items were rated very positively, with all items (except one) having a mean of at least 4.3 (on a five-point scale). The only item receiving a mean rating of less than 4.0 was *caused me to reflect on my practices*. This item had a mean of 3.7, with a rather large standard deviation of 1.24. It may be that the item is unclear or not specific enough, or that the participants viewed the material as new learning, not material to stimulate reflections of personal or professional attitudes.

Table 2 presents the descriptive statistics for section B of the feedback form. Participants were asked to rate each item (which represented skills or roles for which the site researcher would be responsible) on two dimensions: (1) knowledge that the participants gained during the session and (2) their further need for information regarding the item. Table 2 also includes a difference score between the two dimensions, which reflects the discrepancy between what participants learned and elements for which they have further need of information.

**Table 2**  
**Descriptive Statistics for**  
**Section B of Training Feedback Form\***

Item	<i>Knowledge Gain</i>			<i>Further Need</i>			Diff. Score
	N	Mean	SD	N	Mean	SD	
18. Understanding the role of formative evaluation in the CSRD program	18	4.3	1.03	18	1.8	1.0	2.5
19. Knowledge of schools and classrooms	18	3.3	1.24	18	2.2	1.10	1.1
20. Learning data collection techniques	18	4.0	1.14	18	2.2	1.31	1.8
21. Oral and written communication skills	18	2.5	1.42	18	1.4	.86	1.1
22. Facilitation skills	18	2.9	1.26	18	1.9	1.23	1.0
23. Skills in interpreting and analyzing qualitative and quantitative data	18	2.9	1.40	18	2.1	1.23	0.8
24. Knowledge about and understanding of Comprehensive School Reform	18	4.0	1.14	18	1.9	.87	2.1
25. Knowledge about Comprehensive School Reform models	18	3.1	1.23	18	3.1	1.26	0.0
26. Familiarity with common strategies associated with school reform	18	3.2	1.31	18	2.2	1.25	1.0
27. Classroom observation skills	18	3.5	1.20	18	2.1	1.16	1.4
28. Technology skills	18	1.9	1.23	18	2.1	1.30	-0.2
29. Setting up school site visits	17	3.1	1.58	17	1.9	1.34	1.2
30. Collaboration with assigned external facilitator	17	2.7	1.57	17	2.9	1.69	-0.2
31. Identification of and collaboration with a local coordinator	17	2.2	1.51	17	3.0	1.77	-0.8

\*Scale of 1 (none or not at all) to 5 (very much or a lot)

Participants rated their knowledge gain the highest regarding *the role of formative evaluation in the CSRD program* (mean of 4.3, *SD* of 1.03), *data collection techniques* (mean of 4.0, *SD* of 1.14), and *Comprehensive School Reform* (mean of 4.0, *SD* of 1.14). The respondents also indicate that they had relatively little further need for instruction in these items (means of 1.8, 1.9, and 1.9 respectively), suggesting that they had received more than adequate information regarding those items. Most other items had moderate ratings of knowledge gain (means of 2.2 - 3.5). This may indicate that the participants came with a good bit of knowledge with regard to those items. Technology skills was the lowest rated of the knowledge gain items (mean of 1.9, *SD* of 1.23), perhaps indicating that the session did not address these skills and/or that respondents found themselves to be rather competent in this area already.

The data seem to indicate that the areas where participants had the greatest further need for information were *knowledge about Comprehensive School Reform models* (mean of 3.1, *SD* of 1.26); *identification of and collaboration with a local coordinator* (mean of 3.0, *SD* of 1.77); and *collaboration with assigned external facilitator* (mean of 2.9, *SD* of 1.69). This interpretation is also supported by the difference in scores (the relative discrepancy between knowledge gained and further need). The difference scores were 0 or negative for each of these three items.

A reliability coefficient was calculated on the first 17 items of the feedback form to assess internal consistency. Other items on the form were not included in calculation of the reliability coefficient because they were independent items. Coefficient alpha was calculated to be  $r=.85$ . This indicates a relatively reliable instrument.

**Modified participant observation.** The outputs of the modified participant observation technique were handwritten notes and mental impressions retained by the AEL evaluator during the training. These notes and impressions were shared with the training leaders on a regular basis throughout the day. In addition, they were shared with the workshop leaders during daily debriefing sessions. Formative evaluation feedback, including suggestions for improvements in the processes, positive comments by participants, and impressions of activities that went well, was provided in the debriefing sessions, one purpose being to help plan for the next day.

Some of the suggestions for improvement from the participants included keeping to the time schedule on the agenda, possibly sending mailings to participants prior to the training, providing in the training materials the overheads used in the presentations, and allowing more time to practice and discuss the benchmarking process. The many positive comments from the participants related to the enthusiasm and expertise of the presenters, the usefulness of the SOM manual, and the use of an inspirational poem by the workshop leader near the end of the training session.

**Informal, unstructured interviews.** The AEL evaluator spoke informally to a number of AEL and CREP staff during breaks from the training as a means of collecting information about how the FEPSI process would be implemented and how the AEL/CREP partnership was progressing. It was clear from the discussions with the various staff that the FEPSI process was a large undertaking. In addition, some staff were new to their positions and only beginning to define their roles and responsibilities. Though the unstructured interviews were brief and informal, a few themes emerged that are worth noting.

First, it appeared that the number of schools involved exceeded expectations, overburdening staff in preparing for the Site Researcher Orientation and Training. Second, there seemed to be some difficulty in identifying and recruiting site researchers. Third, clarification of AEL and CREP staff roles and responsibilities was needed to facilitate the work efforts of the AEL/CREP partnership.

## CONCLUSIONS

- Participants found the Site Researcher Orientation and Training sessions to have been conducted in a professional manner by competent presenters.
- Participants found the Site Researcher Orientation and Training sessions to be relevant to their needs and to have facilitated development of new skills, while providing materials useful to them in their future work as a site researcher for the Formative Evaluation Process for School Improvement (FEPSI) in CSRD schools.
- Participants seemed to have learned most about the role of formative evaluation in the CSRD program, comprehensive school reform, and specific data collection techniques associated with FEPSI.
- Participants seem to have the most need for further information regarding comprehensive school reform models, identification of and collaboration with a local coordinator, and collaboration with assigned external facilitators.
- More time for discussion of and practice with the benchmarking process might be useful.
- Participants found the actual hands-on experience with the School Observation Measure (SOM) and the benchmarking process very helpful.
- Clarification of specific roles and responsibilities of AEL and CREP staff related to the coordination of FEPSI might prove helpful to the ongoing implementation of FEPSI in AEL's region.

## **RECOMMENDATIONS**

- Include all overheads used by presenters in participants' materials.
- Consider providing more information regarding comprehensive school reform models in subsequent training materials.
- Consider shipping materials to participants prior to the actual on-site training so that participants might complete any necessary reading and become more familiar with the materials/instruments prior to the training event.
- If possible, have actual on-line demonstrations of the FEPSI activity management system.
- Attempt to clarify roles and responsibilities of AEL/CREP partnership staff regarding ongoing implementation of FEPSI.
- Consider allowing more time for the discussion of and practice with the benchmarking process.
- Consider developing a more detailed checklist (incorporating elements of tabs 4 and 5 of current materials) of site researcher responsibilities that also includes a glossary of acronyms and terms.

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## **APPENDIXES**

**Appendix A**  
**Training Feedback Form**

**Site Researcher Orientation and Training**  
**September 13-15, 1999**  
**Louisville, Kentucky**

**Feedback Form: Formative Evaluation Process for School Improvement (FEPSI)**

**Site Researcher ID#** \_\_\_\_\_

*We are interested in continuously improving our services. Please help us to do so by taking a few moments to respond to the following items. Your replies will remain anonymous and confidential, so feel free to answer candidly. Thank you!*

**Section A: Circle the number that best indicates the extent to which the session(s) on the Formative Evaluation Process for School Improvement (FEPSI) . . .**

		Not at all			Very much
1.	Had clear outcomes	1	2	3	4 5
2.	Included clear directions for activities	1	2	3	4 5
3.	Facilitated development of new skills	1	2	3	4 5
4.	Was conducted in an appealing manner	1	2	3	4 5
5.	Was conducted in a professional manner	1	2	3	4 5
6.	Was conducted by competent presenter(s)	1	2	3	4 5
7.	Had activities that were well sequenced	1	2	3	4 5
8.	Had activities that reinforced the content	1	2	3	4 5
9.	Included appropriate examples	1	2	3	4 5
10.	Was relevant to my needs	1	2	3	4 5
11.	Had meaningful involvement of participants	1	2	3	4 5
12.	Caused me to reflect on my practices	1	2	3	4 5
13.	Caused me to examine some of my attitudes	1	2	3	4 5
14.	Stimulated me to want to use the concepts, skills, and/or materials presented	1	2	3	4 5
15.	Provided materials that will be useful to me in my future work as a CSRD site researcher	1	2	3	4 5
16.	Increased communication and collegiality with others	1	2	3	4 5
17.	Increased my understanding of formative evaluation	1	2	3	4 5

**Section B:** Listed below are skills that you need and/or roles that you will be playing as a site researcher. You are asked to rate each item on two dimensions: 1) *knowledge you gained during the session*, and 2) *your need for further information regarding the item*. **Scale:** 1 = None or not at all to 5 = Very much or a lot

		Knowledge gain					Further need				
18.	Understanding the role of formative evaluation in the CSRD program	1	2	3	4	5	1	2	3	4	5
19.	Knowledge of schools and classrooms	1	2	3	4	5	1	2	3	4	5
20.	Learning data collection techniques	1	2	3	4	5	1	2	3	4	5
21.	Oral and written communication skills	1	2	3	4	5	1	2	3	4	5
22.	Facilitation skills	1	2	3	4	5	1	2	3	4	5
23.	Skills in interpreting and analyzing qualitative and quantitative data	1	2	3	4	5	1	2	3	4	5
24.	Knowledge about and understanding of Comprehensive School Reform (e.g., relationship to Title I, school-wide programs, Obey-Porter legislation)	1	2	3	4	5	1	2	3	4	5
25.	Knowledge about Comprehensive School Reform models	1	2	3	4	5	1	2	3	4	5
26.	Familiarity with common strategies associated with school reform (e.g., use of technology, cooperative and team-based strategies, student-centered learning)	1	2	3	4	5	1	2	3	4	5
27.	Classroom observation skills (e.g., recognizing and identifying what is happening in a class)	1	2	3	4	5	1	2	3	4	5
28.	Technology skills (e.g., e-mail capability, Internet access, data entry)	1	2	3	4	5	1	2	3	4	5
29.	Setting up school site visits	1	2	3	4	5	1	2	3	4	5
30.	Collaboration with assigned external facilitator	1	2	3	4	5	1	2	3	4	5
31.	Identification of and collaboration with a local coordinator	1	2	3	4	5	1	2	3	4	5

**Appendix B**  
**Completed Checklist for Applying the Standards**  
**from *The Program Evaluation Standards* (1994)**

## Checklist for Applying the Standards

To interpret the information provided on this form, the reader needs to refer to the full text of the standards as they appear in Joint Committee on Standards for Educational Evaluation, *The Program Evaluation Standards* (1994), Thousand Oaks, CA, Sage.

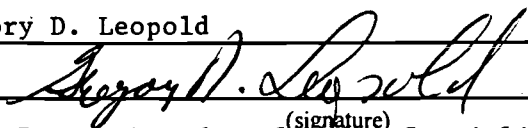
The Standards were consulted and used as indicated in the table below (check as appropriate):

Descriptor	The Standard was addressed	The Standard was partially addressed	The Standard was not addressed	The Standard was not applicable
U1 Stakeholder Identification	X			
U2 Evaluator Credibility	X			
U3 Information Scope and Selection	X			
U4 Values Identification	X			
U5 Report Clarity	X			
U6 Report Timeliness and Dissemination		X		
U7 Evaluation Impact	X			
F1 Practical Procedures	X			
F2 Political Viability	X			
F3 Cost Effectiveness	X			
P1 Service Orientation	X			
P2 Formal Agreements		X		
P3 Rights of Human Subjects	X			
P4 Human Interactions	X			
P5 Complete and Fair Assessment	X			
P6 Disclosure of Findings	X			
P7 Conflict of Interest	X			
P8 Fiscal Responsibility	X			
A1 Program Documentation	X			
A2 Context Analysis	X			
A3 Described Purposes and Procedures	X			
A4 Defensible Information Sources	X			
A5 Valid Information	X			
A6 Reliable Information	X			
A7 Systematic Information	X			
A8 Analysis of Quantitative Information	X			
A9 Analysis of Qualitative Information	X			
A10 Justified Conclusions	X			
A11 Impartial Reporting	X			
A12 Metaevaluation	X			

*The Program Evaluation Standards* (1994, Sage) guided the development of this (check one):

- ☐ request for evaluation plan/design/proposal  
☐ evaluation plan/design/proposal  
☐ evaluation contract  
☒ evaluation report  
☐ other: \_\_\_\_\_

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